

1 Charlotte Inman (CONS/P)

Case No. 0237515

Attorney: Teresa B. Petty-Jones (for Conservators Linda Inman and Carol Inman)

Probate Status Hearing Re: Termination of Proceeding for Deceased Conservatee

		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR.</u> Second and Final Account filed and set for hearing on 3/1/16.
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 1/15/16
		Updates:
		Recommendation:
		File 1- Inman

Petition for Termination of Proceedings Due to Lack of Assets and Discharge of the Personal Representative.

DOD: 1/12/1989		DOLORES TRUJILLO , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from		Petitioner states she and Mary Ellen Rodriguez were appointed as Administrators of the estate without any IAEA authority. Bond was not ordered at that time (see note #1).	<ol style="list-style-type: none"> Petition alleges that at the time of the appointment on 1/16/1990 bond was not ordered. Order appointing Administrator dated 1/16/1990 ordered bond set at \$8,000.00. Bond of \$8,000.00 was filed on 1/17/1990. Petition references Exhibits A & B in regards to the Fresno County Auditor Controller Treasurer Tax Collector sale. No Exhibits are attached to the petition. The petitioner was appointed in 1990 and there was no activity in the estate until it was set for a status hearing in August 2014. The court may inquire why this estate has languished so long and if the personal representative has breached her fiduciary duty to in managing and controlling the estate with ordinary care and diligence. Probate Code §9600. The petition does not state how the real property was managed for 25 years. Was it vacant? Was it rented out? Was it listed for sale prior to 2014?
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
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<input type="checkbox"/>	Aff.Mail		
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<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
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<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
<p>Petitioner states despite efforts to sell the property in the estate and pay delinquent taxes, the home is now under the control of the Fresno County Auditor Controller Treasurer Tax Collector and is scheduled for sale in March 2016.</p> <p>Petitioner prays for an Order:</p> <ol style="list-style-type: none"> Terminating the proceedings due to lack of assets. Discharging the personal representative. 			
			Reviewed by: KT
			Reviewed on: 1/15/16
			Updates:
			Recommendation:
			File 2- Rodriguez

3 Charles David Tucker (Estate)

Executor: Terry Tucker (pro per)

Case No. 0522981**Probate Status Hearing Re: Failure to File and Inventory and Appraisal and Failure to File a First Account or Petition for Final Distribution.**

DOD: 3/4/1994	TERRY TUCKER was appointed as Executor with full IAEA and without bond on 1/17/1995.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 120915	Letters issued on 1/17/1995.	Continued from 12/9/15. Minute order states Mr. Tucker represents that he paid Stephens and Bean Chapel. The Court orders that an inventory and appraisal and a first account be filed by 1/6/16, with proof of payment to Stephens and Bean attached to the accounting. Mr. Tucker is admonished with regard to acting without a Court order and the possibility of surcharge. As of 1/15/16 nothing has been filed.
Aff.Sub.Wit.	Inventory and Appraisal was due June 1995.	1. Need inventory and appraisal and first account, petition for final distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Verified		
Inventory	Creditor's claim filed on 2/14/1995 by Stephens & Bean Chapel in the amount of \$1,160.11.	
PTC		
Not.Cred.		
Notice of Hrg	First account or petition for final distribution was due March 1996.	
Aff.Mail		
Aff.Pub.	Notice of Status Hearing was mailed to Terry Tucker on October 21, 2015.	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Reviewed by: KT
Reviewed on: 1/15/16
Updates:
Recommendation:
File 3 – Tucker

4 Manuel C Rodriguez (Estate) Case No. 05CEPR01418**Attorney Mortimer, Steven R (for Roque Rodriguez – Petitioner – Administrator)****Petition for Settlement of First and Final Account and Final Distribution, and for Order Fixing and Allowing Compensation for All Services Rendered**

DOD: 12/15/1995		ROQUE RODRIGUEZ , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Petition requests that the cash otherwise payable to the Estate of Dolores Rodriguez instead be deposited with the clerk of the Fresno Superior Court pursuant to Probate Code § 11850(d), however there does not appear to be a provision for that in the Probate Code. 2. Order includes the sum of \$1,706.73, otherwise payable to the Estate of Dolores Rodriguez, be paid to the clerk of the Fresno Superior Court. Need new order.
		Account period: 03/07/2006 to 10/27/2015	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.	Accounting - \$28,650.00	
<input checked="" type="checkbox"/>	Verified	Beginning POH - \$18,750.00	
<input type="checkbox"/>	Inventory	Ending POH - \$23,505.94	
<input type="checkbox"/>	PTC	Bond - \$27,7501.00	
<input checked="" type="checkbox"/>	Not.Cred.	(Sufficient)	
<input checked="" type="checkbox"/>	Notice of Hrg	Administrator - \$1,110.00	
<input checked="" type="checkbox"/>	Aff.Mail	(Statutory)	
<input type="checkbox"/>	Aff.Pub.	Attorney - \$1,110.00	
<input type="checkbox"/>	Sp.Ntc.	(Statutory)	
<input type="checkbox"/>	Pers.Serv.	X/O - \$1,000.00 (for	
<input type="checkbox"/>	Conf. Screen	Court confirmed sale of real property pursuant to Local Rule 7.18(A)(1))	
<input checked="" type="checkbox"/>	Letters 03/16/2016		
<input type="checkbox"/>	Duties/Supp	Closing - \$500.00	
<input type="checkbox"/>	Objections	Petitioner requests: that the surviving spouse, Maria Rodriguez be reimbursed \$1,604.25 for costs advanced for fire insurance premiums for the benefit of the estate, and \$900 for costs of administration.	
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report	Distribution pursuant to intestate succession, is to:	
<input checked="" type="checkbox"/>	9202	Maria Rodriguez - \$5,120.19	
<input checked="" type="checkbox"/>	Order	Roque Rodriguez - \$1,706.73	
<input type="checkbox"/>	Aff. Posting	Christopher Rodriguez - \$1,706.73	
<input type="checkbox"/>	Status Rpt	Gabriel Rodriguez - \$1,706.73	
<input type="checkbox"/>	UCCJEA	Manuel Rodriguez, Jr. - \$1,706.73	
<input type="checkbox"/>	Citation	Estate of Dolores Rodriguez - \$1,706.73	
<input checked="" type="checkbox"/>	FTB Notice		

Reviewed by: LV**Reviewed on:** 01/19/2016**Updates:****Recommendation:**

File 4- Rodriguez

5 Darnell L. Cook Jr & Tyquil L. Cook (GUARD/P) Case No. 06CEPR00873**Petitioner Wheeler, Shantia M (Pro Per – Mother)****Petition for Termination of Guardianship**

Darnell, 16	SHANITA M. WHEELER , mother, is Petitioner. MARTHA WALKER , maternal grandmother, was appointed as guardian of the minors on 06/25/2009. <u>Please see petition for details</u>	NEEDS/PROBLEMS/COMMENTS: 1. Petition is incomplete. Petitioner does not provide a reason why termination of the guardianship is in the best interest of the minors. 2. Need <i>Notice of Hearing</i> . 3. Need proof of service of the Notice of Hearing on: a. Martha Walker (Maternal Grandmother/Guardian) b. Darnell Cook, Sr. (Father) – if court does not dispense with notice. c. Darnell Cook, Jr. (Minor) d. Tyquil Cook (Minor) e. Paternal Grandparents (Not Listed) f. Kim Johnson, Sr. (Maternal Grandfather)	
Tyquil, 14			
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg			x
<input type="checkbox"/> Aff.Mail			x
<input type="checkbox"/> Aff.Pub.			
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<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
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<input checked="" type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

Reviewed by: LV
Reviewed on: 01/19/2016
Updates:
Recommendation:
File 5- Cook

DOD: 1/18/06	BETTY MARIE GLOVER , daughter, was appointed as Executor with Full IAEA with bond of \$276,000.00 on 8/28/07. Bond was filed and Letters issued on 11/1/07.	NEEDS/PROBLEMS/COMMENTS: Minute Order 7/30/15: Counsel represents that Ms. Glover has been cleaning up the property and will be selling it; requests 6 months. Note: Attorney Fanucchi filed a "Notice of Lien for Attorney's Fees" alleging fees totaling \$1,630.00; however, there does not appear to be any Court order authorizing this sum to this attorney. Note: According to the decedent's will dated 2/20/03 which was admitted to probate on 8/28/07, the heirs to this estate are the decedent's three children: Administrator Betty Glover, Donald Hunt, and Barbara Hunt. <ol style="list-style-type: none"> Need First Account and Petition for Final Distribution or verified written status report regarding the status of administration and the estate assets and the estimated time to close the estate. The original petition estimated the value of the estate at \$276,000.00 which included real and personal property and the Executor filed a bond in that amount of 11/1/07. The Inventory and Appraisal filed 9/8/14 indicates real property only valued at \$350,000.00. The Court may require increased bond pursuant to Cal. Rules of Court 7.204.
Cont. from 062014, 081714, 093014, 013015, 073015	The appointment was appealed; however, pursuant to the Opinion entered 5/22/08 by the Fifth Appellate District, the order of the probate court was affirmed and costs were awarded to the Executor. Remittur was filed 7/23/08.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	On 2/14/14, the Court set this status hearing for failure to file a petition for final distribution.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice	<p>On 2/14/14, the Court set this status hearing for failure to file a petition for final distribution.</p> <p>Status Report filed 1/21/15 by Attorney Amador states the estate consists mainly of a single real property asset that contains a residence and a long defunct commercial property. One of the heirs, Executor's sister Barbara Hunt, has been occupying the property for many years in defiance of the Executor's direction. The Executor has been attempting to remove her sister from the property through negotiation in hopes of avoiding a formal eviction causing more distress and distrust between the siblings than already exists. This has proven fruitless. Therefore, Executor has engaged counsel to evict Ms. Hunt. A 30 day notice was served 1/2/15. If the property is not vacated, an unlawful detainer action will be filed. However, Barbara Hunt is already designated as a Vexatious Litigant, and it is expected that she will fight the lawsuit. It is expected that this will take a few months. Executor requests a six month continuance for the eviction to run its course and to allow time to sell the property.</p>	
Reviewed by: skc		
Reviewed on: 1/19/16		
Updates:		
Recommendation:		
File 6 – Hunt		

Third and Final Account and Report Filed by the Public Guardian on Behalf of the Former Conservator

		PUBLIC GUARDIAN , Conservator of the Estate, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		The Public Guardian presents this Third and Final Account and Report on behalf of the former conservator, Ruby Jones, who is deceased.	
Conf. from 102815		Account period: 11/1/12 – 9/24/14	Note: The status hearing for the filing of the First Account by the Public Guardian as Successor Conservator was continued to 3/9/16.
	Aff.Sub.Wit.	Accounting: \$207,443.31	
✓	Verified	Beginning POH: \$144,606.16	
	Inventory	Ending POH: \$ 9,614.29	
	PTC	Conservator: \$820.15 (for 0.66 Deputy hours @ \$96/hr plus 9.60 Staff hours @ \$76/hr)	
	Not.Cred.	Attorney: \$1,250.00 (per local rule)	
✓	Notice of Hrg	Costs: \$52.00 (for certified letters)	
✓	Aff.Mail	Petitioner prays for an order:	
	Aff.Pub.	1. Approving, allowing and settling the account as filed;	
	Sp.Ntc.	2. Authorizing the successor conservator's and attorney's fees and commissions;	
	Pers.Serv.	3. Authorizing the costs; and	
	Conf. Screen	4. Any other orders the Court considers proper.	
	Letters	Response to Examiner Notes filed 12/28/15 provides the following additional information:	
	Duties/Supp	1. Examiner notes requested facility statements per §2620(c)(5) and noted that the cost of care appears to have substantially increased in August 2013 to approx. \$15-20,000/month without explanation.	
	Objections	Petitioner states the conservatee's money was in a blocked account and the bank released money to the former conservator without unblocking the funds. Once the money came out of the blocked account, he lost his Medi-Cal eligibility. Before that, Medi-Cal was paying the cost of share of approx. \$2,500. Afterward, he had to pay the private rate of approx. \$16,000.	
	Video Receipt	2. Examiner notes stated the disbursements schedule indicates numerous "unknown" expenses, and requested clarification.	
✓	CI Report	Petitioner states the PG did look into expenditures made by the former (deceased) conservator and although unable to determine the nature of each expenditure, she deduced based on experience with other cases that many were probably pharmacy or other medical expenses. The Conservatee's care was consistent, and the bulk of the blocked account paid for his care at the subacute facility.	
✓	2620(c)		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Reviewed by: skc

Reviewed on: 1/19/16

Updates:

Recommendation:

File 7 – Cooley

8 Rhenm Graves Living Trust of 1997, as Amended Case No. 08CEPR00171

Attorney: Michael P. Dowling (for Petitioner Wells Fargo Bank)

Attorney: William Coleman (Guardian Ad Litem for Michael Dean Hankel)

Petition for Order Approving Modification of Trust

			WELLS FARGO BANK N.A. , Trustee, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from			Petitioner states RHENM GRAVES (settlor) established the RHENM GRAVES LIVING TRUST of 1997 on June 27, 1997.	
	Aff.Sub.Wit.			
✓	Verified		On February 2, 1998 Settlor executed a FIRST AMENDMENT to the RHENM GRAVES LIVING TRUST of 1997.	
	Inventory			
	PTC			
	Not.Cred.		On January 17, 2000, Settlor executed a SECOND AMENDMENT to the RHENM GRAVES LIVING TRUST of 1997.	
✓	Notice of Hrg			
✓	Aff.Mail	W/	Thereafter, on October 7, 2000, Settlor executed a THIRD AMENDMENT to the RHENM GRAVES LIVING TRUST of 1997.	
	Aff.Pub.			
✓	Sp.Ntc.	W/		
	Pers.Serv.		Settlor executed a FOURTH AMENDMENT to the RHENM GRAVES LIVING TRUST of 1997 on June 13, 2006.	
	Conf. Screen			
	Letters		Settlor died on June 20, 2007.	
	Duties/Supp			
	Objections		The beneficiaries of the Trust are MICHAEL DEAN HANKEL ("DEAN"), Settlor's grandson, and BRENDA STANDALAND ("BRENDA"), the niece of Settlor.	
	Video Receipt			
	CI Report			
	9202			
✓	Order		Dean is the current income beneficiary of the Trust and is paid a monthly stipend with cost of living adjustments. Dean has no other source of income and is developmentally disabled. Should Dean survive to age fifty-five (55), he is to take the entire trust estate, currently valued at \$1,662,452.67, outright and free of trust.	
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice		Brenda Stanaland is a contingent beneficiary as to only an income and support interest for the period of her life.	
Please see additional page				

Reviewed by: KT

Reviewed on: 1/19/16

Updates:

Recommendation:

File 8- Graves

8 Rhenm Graves Living Trust of 1997, as Amended Case No. 08CEPR00171

Petitioner seeks modification of Trust to allow the Trustee to exercise discretion to invade principal when income is insufficient for purposes of health, education, maintenance and support for Dean. The Trust currently pays Dean \$3,072.83 monthly for living expenses such as rent, health insurance, weekly support, meds and clothing. Annualized the monthly stipend totals \$36,873.96. The Trust's annual net income is approximately \$22,647.

Pursuant to Order of this Court dated August 14, 2008, the Trustee was instructed to accumulate Dean's income and distribute it using the ascertainable standard above-referenced, but neither the Order or the Trust, address the use of principal when income is insufficient.

Relevant Provisions of the Trust:

Article X of the Trust states in pertinent part as follows:

"[t]he Trustee shall distribute, on the first of each and every month, beginning on the month after my death, the sum of \$1,500.00 payable each and every month, to my grandson, MICHAEL DEAN HANKEL.

The Trustee shall not distribute any of the principal of any of the holding in this Trust, or any of the property contained in or comprising the Trust Estate to MICHAEL DEAN HANKEL during his life. It is my clear intention as I so expressly instruct that my grandson is to receive income for life, but my grandson is not to receive any of the principal of the trust estate, except to pay catastrophic medical expenses of MICHAEL DEAN HANKEL, and then only as the Trustee shall at his or her sole discretion shall approve."

At Part Four of the Second Amendment to the Trust, it states in pertinent part as follows:

"The Trustee shall distribute to my grandson, MICHAEL DEAN HANKEL, the sum of \$2,000.00 each and every month. Above and beyond that sum of money, the Trustee shall distribute and maintain health insurance on MICHAEL DEAN HANKEL, if at all possible, and the Trustee shall distribute and pay any and all health insurance premiums that might be presented to him by MICHAEL DEAN HANKEL so that my grandson may have health insurance on himself during his life. In the even that MICHAEL DEAN HANKEL, should incur medical expenses that are not covered by the aforementioned health insurance, the Trustee shall also distributed funds and directly pay said medical expenses."

The Fourth Amendment to the Trust states in pertinent part as follows:

"The Trustee shall distributed to my grandson, Michael Dean Hankel, the sum of \$3,000.00 each and every month. This amount shall be adjusted annually based on the Cost of Living Index (COLA)"

Please see additional page

8 Rhenm Graves Living Trust of 1997, as Amended Case No. 08CEPR00171

In Article X of the Trust, the Trustee is directed to pay Dean a monthly stipend, and it is inferred that this is to come from income since the plain language states there should be no principal distributions unless in the case of catastrophic illness. The Second Amendment amends Article X, but does not mention the use of principal on Dean's behalf. Therefore, it has become necessary, from the Petitioner's perspective, to request modification of the Trust for the purpose of allowing the Trustee discretion to invade principal, as income is currently insufficient to cover support payments which rise each year due to COLA increases.

Petitioner requests that the third paragraph of Article X ("DISTRIBUTION OF TRUST ESTATE") of the Trust, be replaced with the following language;

"The Trustee shall have the authority to exercise its discretion to invade the Trust's principal whenever income is insufficient for expenses related to the health, education, maintenance and support of the beneficiary."

Petitioner further requests that the above-referenced language be incorporated by this reference into Part Four of the Second Amendment to the Trust, executed January 17, 2000 and the Fourth Amendment to the Trust executed on June 13, 2006.

Petitioner prays for an Order:

That this court approve the modification to the third paragraph of Article X ("DISTRIBUTION OF TRUST ESTATE") of the Trust, such that the third paragraph of Article X read as follows: *"The Trustee shall have the authority to exercise its discretion to invade the Trust's principal whenever income is insufficient for expenses related to the health, education, maintenance and support of the beneficiary"* and that this language be incorporated by reference into the Second and Fourth Amendments to the Trust.

Notice of Status Hearing Re: Failure to File a First Account or Petition for Final Distribution

DOD: 11/25/07	MARGIE GFELLER , Spouse, was appointed as Executor without IAEA authority and without bond on 03/18/08. Letters were issued on 05/13/08.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 07/30/15</u> 1. Need Accounting/Report of Administrator and Petition for Final Distribution.
Cont. from 010314, 030714, 050214, 073114, 081414, 091814, 121814, 041615, 073015	Petition for Authority to Administer Estate without Court Supervision filed 06/02/08. Order Granting Authority To Administer Estate Without Court Supervision was filed 07/10/08. Letters Testamentary with Full IAEA Authority were issued on 07/14/08.	
Aff.Sub.Wit.	Inventory & Appraisal, partial no. 1 - \$210,000.00	
Verified		
Inventory	Inventory & Appraisal, partial no. 2 - \$835,000.00	
PTC		
Not.Cred.		
Notice of Hrg	Notice of Status Hearing filed 10/31/13 set this matter for status regarding failure to file a First Account and/or Petition for Final Distribution.	
Aff.Mail	Clerk's Certificate of Mailing states that the Notice of Status Hearing was mailed to Joanne Sanoian on 10/31/13.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	Status Hearing Report filed 01/13/16 states: federal and state tax liens and/or liabilities must be resolved prior to the preparation of a Petition for Final Distribution. The Executor is the sole beneficiary and therefore counsel believes that the estate can be closed by a Petition for Final Distribution on waiver of account. Based on the tax liabilities, it is clear that the beneficiary will not receive any distribution from the estate and it is very probable that neither the Executor nor her counsel will receive any compensation for their services unless the IRS agrees to allow the Executor or her counsel any compensation. Counsel is now in possession of most of the documents and records for 2009 and is working diligently to prepare and file the federal tax returns. Counsel requests this matter be continued to late July 2016. Counsel believes that the IRS and FTB tax liabilities can be resolved during that time period and a Petition for Final Distribution can be filed soon after the resolution of those corporate tax liabilities.	
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 01/15/16
		Updates:
		Recommendation:
		File 9 – Gfeller

10 Edward Hawkins, III, Emmanuel Hawkins, Case No.13CEPR00624
John Hawkins, and Adam Hawkins (GUARD/P)
Atty Manjarrez, Yvette (Pro Per – Mother – Petitioner)
Petition for Visitation

Emmanuel, age 6		YVETTE MANJARREZ , Mother, is Petitioner. APRIL FLORES and JACINTO SARABIA , Paternal Grandparents, were appointed Guardians on 9-23-13. <u>Please see petition for details</u>	NEEDS/PROBLEMS/COMMENTS: Minute Order of 11/18/2015: Examiner notes provided in open court. The following issues still remain: 1. Need Notice of Hearing. 2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing on all relatives pursuant to Probate Code § 1460, including: <ul style="list-style-type: none"> • April Flores (Guardian) • Jacinto Sarabia (Guardian) • Edward Hawkins (Father) • Maternal Grandfather • Jackie Navarra Current Visitation Order pursuant to Minute Order of 04/01/2015: The Court Orders Supervised visitation for Yvette Manjarrez, mother, every other Saturday from 12pm to 2pm at the McDonald's on Kings Canyon and Barton, starting 04/04/2015. Visits are to be supervised at all times by at least one of the guardians. If Ms. Manjarrez is more than 15 minutes late for any visit, she loses that day's visit.	
Edward, age 7				
John, age 4				
Adam, age 3				
Cont. from 100715, 111815				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			x
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order	n/a		
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: LV				
Reviewed on: 01/19/2016				
Updates:				
Recommendation:				
File 10 – Hawkins				

**Mikaylah Pizano-Ortiz, Aubreyella Pizano-Ortiz,
and Jameson Valor Cruz (GUARD/P)**

Case No. 13CEPR01010

Petitioner
Guardian

Pizano, Gabino (Pro Per – Father – Petitioner)
Ortiz, Nellie (Pro Per – Maternal Grandmother – Guardian)

Petition for Visitation

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> This petition pertains to Mikayla and Aubreyella only. <u>Minute Order 12/9/15:</u> Gabino Pizano is to cure the service defect and file/properly serve paper proof regarding status of his criminal charges and restraining order no later than 1/6/16. Any written objections or declarations by Nellie Ortiz are to be filed and served by 1/6/16. The following issues remain noted: 1. Need Notice of Hearing and proof of service at least 15 days prior to the hearing on Guardian Nellie Ortiz. 2. The Court may also require notice to the mother and other relatives.
Cont. from 120915			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
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	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
✓	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Reviewed by: skc
Reviewed on: 1/19/16
Updates:
Recommendation:
File 11 – Ortiz-Cruz

Petition for Appointment of Successor Probate Conservator of the Person and Estate

See petition for details.			NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 12/17/15. 1. Need video receipt per Local Rule 7.15.8.A. 2. The former conservator was granted dementia medication and placement powers under Probate Code §2356.5; however, this petition does not appear to include a request for such powers. Need clarification. 3. The former conservator was previously authorized to obtain a reverse mortgage on the residence. At the first account, no funds had been withdrawn yet; however, when necessary, 1/3 was to be placed in Conservatee's account. At this time, the Court may require an update on the reverse mortgage. 4. The Order Appointing Successor Conservator GC-340 was recently updated by the Judicial Council on 1/15/16 to include mandatory language re voting rights. The Court may require the order to be on the updated form. <u>Note:</u> The Court will set a status hearing for the filing of bond by the successor conservator as follows: <ul style="list-style-type: none"> Wednesday March 16, 2016 <u>Note:</u> The Former Conservator's First Account settled 4/30/15 covered through 2/28/15, and the Court set a status hearing for 4/27/17 for the filing of the next account. Given the changed circumstances, the Court may set a sooner status hearing date for the filing of a final account of former conservator as appropriate.
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt	X	
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
Reviewed by: skC Reviewed on: 1/19/16 Updates: Recommendation: File 12- Perehoduk			

Petition for Appointment of Guardian of the Person

		Temporary Expires 1/20/16	NEEDS/PROBLEMS/COMMENTS:
		ANTHONY MARSHALL, maternal step-grandfather, is petitioner.	1. Need proof of personal service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: a. Frank Solis, Jr. (father) – unless the court dispenses with notice. – mailed notice on 12/14/15 to last known address.
		Please see petition for details.	
Cont. from 111815		Court Investigator Report filed on 11/10/15	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 1/15/16
			Updates:
			Recommendation:
			File 13 – Solis

		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR.</u> <u>2nd Amended Petition for First Account and Final Distribution filed 01/12/2016.</u> <u>Hearing is set for 03/21/2016.</u>
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: LV
		Reviewed on: 01/19/2016
		Updates:
		Recommendation:
		File 14- Vallandingham

Attorney Pape, Jeffrey B. (for Margie Martinez and Monica Magallanes – Objectors)
 Attorney Celaya, Anthony G. (for Felix Magallanes – Administrator/Petitioner)

First and Final Account, Report of Administrator, Petition for Statutory Fees and for Distribution of Intestate Estate

DOD: 11/05/13	FELIX C. MAGALLANES , Administrator, is Petitioner.		NEEDS/PROBLEMS/ COMMENTS:
	Account period: 11/05/13 – 10/31/15		
Cont. from	Accounting: \$897,783.45		<p align="center">OFF CALENDAR Restatement of First and Final Account filed 01/15/16 and set for hearing on 02/29/16</p> <p>Need amended account, based on, but not limited to the following:</p> <ol style="list-style-type: none"> 1. There is an error in the statutory fee calculation. The correct statutory fee is \$20,932.57, based on the fee base of \$896,628.86. 2. Petitioner states that the Wells Fargo Annuity inventoried at \$205,128.86 will pass outside of probate to designated beneficiaries. Therefore, it appears that this asset should not have been inventoried as an asset of the estate and should not be factored into the fee base for calculation of the statutory fees. 3. Petitioner proposes to distribute real property in undivided interests, therefore, need written consent of all distributees pursuant to Local Rule 7.14.4A. 4. Need Order.
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH: \$896,628.86		
<input checked="" type="checkbox"/> Verified	Ending POH: \$834,578.64		
<input type="checkbox"/> Inventory	Administrator: \$23,932.58 (more than statutory)		
<input type="checkbox"/> PTC	Administrator costs: \$23,271.35 (filing fees, probate referee, maintenance of real property, funeral expenses, etc.)		
<input checked="" type="checkbox"/> Not.Cred.	Attorney: \$23,932.58 (more than statutory)		
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner states that the Wells Fargo Annuity that is inventoried as an asset of the estate will pass directly to the designated beneficiaries.		
<input checked="" type="checkbox"/> Aff.Mail	w/	Distribution, pursuant to intestate succession, is to:	
<input type="checkbox"/> Aff.Pub.		Felix Magallanes: \$151,271.09 cash, plus 1/3 interest in real property and tangible personal property including two cars valued at \$6,500.00	
<input type="checkbox"/> Sp.Ntc.		Margie Martinez: \$157,771.09 cash, plus 1/3 interest in real property	
<input type="checkbox"/> Pers.Serv.		Monica Magallanes Ibarra: \$157,771.09 cash, plus 1/3 interest in real property	
<input type="checkbox"/> Conf. Screen		Objection to First and Final Account filed 01/11/16 by Margie Martinez and Monica Magallanes states: petitioner failed to inventory shares of common stock and/or investment accounts owned by Decedent at the time of her death. Objectors believe these investments exceed \$400,000.00. Objectors request that Petitioners First and Final Account be denied and Petitioner be ordered to appear regarding the missing account.	
<input type="checkbox"/> Letters	10/21/14		
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input checked="" type="checkbox"/> 9202			
<input type="checkbox"/> Order	x		
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input checked="" type="checkbox"/> FTB Notice			
			Reviewed by: JF
			Reviewed on: 01/19/16
			Updates:
			Recommendation:
			File 15- Magallanes

First and Final Account and Report of Executor, Petition for Final Distribution

DOD: 11/14/13		KIMBERLY KYLE HALL , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Need Amended Petition based on but not limited to the following: 1. Petition states this is an accounting however there is no accounting attached. Probate Code §1060. 2. Inventory and Appraisal did not include the date of death of Decedent. 3. Petition did not include a statement as to whether or not creditors have been noticed. Probate Code §9050 states that the personal representative shall give notice to all known or reasonably ascertainable creditors. This is in addition to the publication. 4. Petition does not contain a statement regarding Probate Code §216 and 9202(b) re: notice to the Director of Victims Compensation and Government Claims Board. 5. Petition requests distribution to Kimberly Kyle Hall and Whitney Erin Hurd. However, the Will devises the estate to the John J. Oppelt and Barbara J. Oppelt Revocable Trust. Please see additional page
		Account period: ??	
Cont. from		Accounting - ?	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$300,000.00	
<input checked="" type="checkbox"/>	Verified	Ending POH - ?	
<input checked="" type="checkbox"/>	Inventory	Executor - waives	
<input checked="" type="checkbox"/>	PTC	Attorney - \$5,000.00	
<input type="checkbox"/>	Not.Cred.	(less than statutory)	
<input type="checkbox"/>	Notice of Hrg	Proposed distribution is to:	
<input type="checkbox"/>	Aff.Mail	Kimberly Kyle Hall	
<input type="checkbox"/>	Aff.Pub.	Whitney Erin Hurd	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters	11/17/14	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input type="checkbox"/>	Order	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 1/19/16
			Updates:
			Recommendation:
			File 16- Oppelt

6. Notice of Hearing was not on the Mandatory Judicial Council form (DE-020).
7. Proof of service of the Notice was not signed.
8. Petition does not comply with Local Rule 7.12.1. Petition must list the property to be distributed. The description shall include the cash on hand. Description in the petition of any asset by reference to the inventory is not acceptable.
9. Need Order.

17 Lewis Sanders (Estate) Case No. 15CEPR00388**Administrator Wright, Katrena Louisa (Pro Per)****Probate Status Hearing RE: Litigation and Whether or not an Inventory and Appraisal is Needed**

DOD: 12/29/2008	KATRENA LOUISA WRIGHT , was appointed Administrator without IAEA authority, without bond unless assets are received on 08/19/2015.	NEEDS/PROBLEMS/COMMENTS: 1. Need Inventory and Appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Cont. from	Letters issued on 08/21/2015.	
Aff.Sub.Wit.	Minute Order of 08/19/2015 set this Status Hearing regarding litigation and whether or not an Inventory and Appraisal is needed. Minute Order states: Ms. Wright represents to the Court that there is no money or property in the estate, and that she filed only because of a pending medication lawsuit that was filed three years ago. The Court appoints Ms. Wright as Administrator with no authority and orders no bond unless assets are received.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 01/19/2016
		Updates:
		Recommendation:
		File 17- Sanders

		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR.</u> <u>Final Inventory and Appraisal</u> <u>filed 01/06/2016.</u>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 01/19/2016
		Updates:
		Recommendation:
		File 18- Mora

Petitioner

Tapia, Tony, Jr. (pro per – non-relative)

Petitioner

Tapia, Kimiki S. (pro per – maternal aunt)

Petition for Appointment of Guardian of the Person

Age: 6		TEMPORARY EXPIRES 01/20/16		NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 12/09/15</u> Minute Order from 12/09/15 states: For the record, Mindy Mireles is the paternal grandmother and Tony Valenzuela is the maternal grandfather. The Court orders each parent to file and properly serve paper proof of what they understand to be the current Family Law visitation orders no later than 01/06/16.
		TONY TAPIA, JR., non-relative, and KIMIKI TAPIA, maternal aunt, are Petitioners.		
		Father: EUSEBIO MIRELES – Further notice not required per 10/14/15 Minute Order		
Cont. from 101415, 120915		Mother: CRYSTELLE VALENZUELA – Consent & Waiver of Notice filed 09/21/15		
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	w/		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	w/		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
		Paternal grandfather: EUSEBIO MIRELES – deceased Paternal grandmother: MINDY MIRELES – served by mail on 11/17/15 Maternal grandfather: TONY VALENZUELA – served by mail on 11/17/15 Maternal grandmother: MICHELLE MAYEDA – personally served on 11/17/15 Sibling: BRIANNA MADRIGAL – served by mail on 11/17/15 Petitioners state [see file]. Objection to Guardianship filed 09/29/15 by Eusebio Mireles, Jr. (father). Court Investigator Dina Calvillo filed a report on 10/08/15. Court Investigator Dina Calvillo filed a Supplemental Report on 10/29/15. Declaration of Petitioners Tony Tapia, Jr. and Kimiki Tapia filed 12/04/15. Declaration of Eusebio Mireles, Jr. (father) filed 12/07/15. Declaration attaching Order re Child Custody and Visitation filed 01/04/16 by Eusebio Mireles, Jr. Declaration filed 01/06/16 attaching a Request for Modification of Child Custody and Visitation. Declaration filed 01/06/16 by Kimiki Tapia.		
Reviewed by: JF				
Reviewed on: 01/19/16				
Updates:				
Recommendation:				
File 19 – Valenzuela				

Attorney J. Stanley Teixeira (Petitioner, self-represented Attorney, Court-Appointed for Proposed Conservatee)

Petition for Compensation

			<p>J. STANLEY TEIXEIRA, Attorney Court-appointed on 9/22/2015 to represent the proposed Conservatee, is Petitioner.</p> <p align="center"><i>~Please see Petition for details~</i></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			<p>Reviewed by: LEG</p> <p>Reviewed on: 1/19/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 20- Arceo</p>	

Petition for Appointment of Guardian of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: Continued from 12/2/15. All notice issued have now been cured. <u>Note:</u> Angela Wulf, mother, filed her objection on 1/13/16.
Cont. from 120215				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail	X		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 1/19/16	
			Updates:	
			Recommendation:	
			File 21- Astone	

Petition for Appointment of Guardian of the Person

See petition for details.			NEEDS/PROBLEMS/ COMMENTS:
			Minute Order 12/9/15: Examiner notes provided in open court. Petitioner is admonished to inform the Deputy of the need for an interpreter upon entering the courtroom.
Cont.d from 120915			As of 1/19/16, nothing further has been filed. The following issues remain:
	Aff.Sub.Wit.		
✓	Verified		<ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 on: <ul style="list-style-type: none"> - Juan Antonio Torres (Maternal Grandfather) - Eric Knighton (sibling) - Dominic Knighton (sibling)
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 1/19/16
			Updates:
			Recommendation:
			File 22 – Knighton

Petitioner Kendoyan, Abraham Ohannes (Pro Per Petitioner)

Petitioner Adourian, Maghy (Pro Per Petitioner)

Petition for Appointment of Probate Conservator

NO TEMPORARY REQUESTED		NEEDS/PROBLEMS/COMMENTS:
ABRAHAM KENDOYAN and MAGHY ADOURIAN , parents, are Petitioners and request appointment as Co-Conservators of the Person with medical consent powers.		1. Need <i>Citation for Conservatorship</i> pursuant to Probate Code § 1823, and proof of personal service of the <i>Citation</i> on the proposed Conservatee with a copy of the <i>Petition for Appointment of Probate Conservator</i> pursuant to Probate Code § 1824.
~Please see <i>Petition for details</i> ~		
Court Investigator's Report was filed on 1/12/2016.		
Court Investigator's Supplemental Report was filed on 1/19/2016.		
Cont. from		
Aff.Sub.Wit.		
✓ Verified		
Inventory		
PTC		
Not.Cred.		
✓ Notice of Hrg		
Aff.Mail	N/A	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	X	
✓ Conf. Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
✓ Video Receipt		
✓ CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation	X	
FTB Notice		
Reviewed by: LEG		
Reviewed on: 1/19/16		
Updates: 1/19/16		
Recommendation:		
File 23- Kendoyan		

24 Andre Cleveland, Sierra Cleveland, Jherriah Derisso (GUARD/P)
Case No. 15CEPR01125

Petitioner McCaleb, Johninieta (Pro Per – Maternal Aunt)

Petition for Appointment of Guardian of the Person

Andre Age: 9	<p align="center"><u>TEMPORARY EXPIRES 01/20/2016</u></p> <p>JOHNINIETA MCCALED, maternal aunt, is petitioner.</p> <p align="center"><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. The father of Jerriah, Gerard Derisso, was served by mail on 12/29/2015. Pursuant to Probate Code §2250 personal service is required.</p> <p>Note: The Notice of Hearing filed 01/05/2016 indicates that the father was served by mail to an address in Los Angeles however according to the CI Report the father resides in Arizona.</p> <p>2. The minor, Jerriah, Derisso, was served by mail on 12/29/2015. Pursuant to Probate Code §2250 personal service is required.</p>
Sierra Age: 7		
Jherriah Age: 13		
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail w/		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv. w/		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
<p>Reviewed by: LV</p> <p>Reviewed on: 01/19/2016</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 24- Cleveland & Derisso</p>		

Petition to Determine Succession to Real Property

DOD: 4/13/15		<p>JOYCE E. MOSELY, DEBRA LYNN HUFF, MICHAEL MOSELY, children of decedent and MATTHEW MOSLEY and JENNIFER CANEDO, grandchildren of decedent, are petitioners.</p> <p>40 days since DOD.</p> <p>No other proceedings.</p> <p>Will date: July 14, 1981</p> <p>I & A - \$85,000.00</p> <p>Petitioners request court determination that Decedent's 100% interest in real property located on Kenmore Drive in Fresno passes to them, 25% to Joyce E. Mosley, Debra Lynn Huff and Michael Mosely and 12.5% to Matthew Mosely and Jennifer Canedo.</p>	NEEDS/PROBLEMS/COMMENTS:
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail W/		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: KT Reviewed on: 1/19/16 Updates: Recommendation: SUBMITTED File 25- Mosley	

**Petition for Letters of Administration; Authorization to Administer Under the
Independent Administration of Estates Act**

DOD: 6/6/13		ARNOLD BERNAL OROSCO , son, is petitioner and requests appointment as Administrator without bond. All heirs waive bond (see note #1) Full IAEA – o.k. Decedent died intestate. Residence: Fresno Publication: Fresno Business Journal	NEEDS/PROBLEMS/COMMENTS: 1. Waiver of Bond by the beneficiaries is not on the mandatory Judicial Council form DE-140/DE-111. The form contains specific language regarding the rights of those waiving bond that are not contained in the waivers signed by the beneficiaries that is attached to the petition. <u>Note:</u> If the petition is granted, status hearings will be set as follows: <ul style="list-style-type: none"> • Wednesday, February 24, 2016 at 9:00 a.m. in Department 303, for the filing of the bond, if required. • Wednesday, June 22, 2016 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. • Wednesday, March 29, 2017 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	W/		
<input checked="" type="checkbox"/> Aff.Pub.			
Sp.Ntc.		Estimated value of the estate: Personal property - \$161,449.45 Probate Referee: Rick Smith	
Pers.Serv.			
Conf. Screen			
<input checked="" type="checkbox"/> Letters			
Duties/Sup p			
Objections			
Video Receipt			
CI Report			
9202			
<input checked="" type="checkbox"/> Order			
Aff. Posting		Reviewed by: KT Reviewed on: 1/19/16 Updates: Recommendation: File 26- Orosco	
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Petitioner Castillo, Goria (Pro Per Petitioner)
 Petitioner Garza, Margaret (Pro Per Petitioner)
 Petitioner Castillo, Fredderic (Pro Per Petitioner)

Petition to Determine Succession to Real Property

DOD: 1/24/15		GLORIA CASTILLO, MARGARET GARZA, and FREDDERIC CASTILLO , children of the decedent, are Petitioners. 40 days since DOD I&A: \$95,000.00 (real property located at 1762 S. Prospect in Fresno, which is subject to a lien by the County of Fresno, Dept. of Public Works & Planning) Decedent died intestate Petitioners request Court determination that the real property passes to them in 1/3 undivided interests each.	NEEDS/PROBLEMS/COMMENTS: 1. Need date of death of the decedent's deceased spouse per Local Rule 7.1.1.D. (Note: If the spouse died after the decedent, amendment may be necessary). 2. Petitioners do not state at Attachment #11 what the decedent's interest in the real property is. Did the decedent own the real property 100%? 3. The Inventory and Appraisal contains white-out at #1, which is a value for personal property. The amount indicated under the white-out appears to be \$76,689.00, which, if there are additional assets at this value, would put this estate at over the value limit for use of this summary proceeding. The petition, however, does not request Court determination re personal property. Therefore, need clarification regarding the white-out on the form and whether there are or were additional assets.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: skc
Reviewed on: 1/19/16
Updates:
Recommendation:
File 27- Castillo

Petitioner

Shipman, Gary (pro per – non-relative)

Petitioner

Shipman, Amy (pro per – non-relative)

Petition for Appointment of Temporary Guardian of the Person

Age: 13		GENERAL HEARING: 03/07/16		NEEDS/PROBLEMS/COMMENTS:	
		AMY SHIPMAN and GARY SHIPMAN,		1. Need <i>Notice of Hearing</i> . 2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Pete Estrada, III (father) b. Ila Ripson (mother) c. Christina Estrada (minor)	
		non-relatives, are Petitioners.			
		Father: PETE ESTRADA, III			
Cont. from		Mother: ILA RIPSON			
	Aff.Sub.Wit.	Paternal grandfather: PEDRO ESTRADA			
✓	Verified	Paternal grandmother: GRACIELLA ESTRADA			
	Inventory				
	PTC				
	Not.Cred.				
	Notice of Hrg	x	Maternal grandparents: DECEASED		
	Aff.Mail		Siblings: GABRIEL RIPSON (24), ALEXX ESTRADA		
	Aff.Pub.		Petitioners state [see file for details].		
	Sp.Ntc.				
	Pers.Serv.	x			
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
				Reviewed by: JF	
				Reviewed on: 01/19/16	
				Updates:	
				Recommendation:	
				File 28- Estrada	

Petitioner Cruz, Peggy D. (Pro Per – Maternal Grandmother – Petitioner)

Petition for Appointment of Temporary Guardian of the Person

See petition for details.			NEEDS/PROBLEMS/COMMENTS: 1. If diligence is not found, need personal service of Notice of Hearing with a copy of the petition on Everardo Mendoza Acosta (Father) per Probate Code §2250(e).
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	x	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 1/19/16
			Updates:
			Recommendation:
			File 29- Mendoza

Petitioner: Joel Pimentel, JR (pro per)

Petition for Appointment of Temporary Guardian of the Person

<u>GENERAL HEARING: 3/8/16</u>			NEEDS/PROBLEMS/COMMENTS:
<p>JOEL PIMENTEL, JR. brother, is petitioner.</p> <p>Please see petition for details.</p>			
Cont. from			<ol style="list-style-type: none"> Need proof of service of the Notice of Hearing along with a copy of the temporary petition or consent and waiver of notice on: <ol style="list-style-type: none"> Joel Pimentel (father) – unless the court dispenses with notice. Maria Engracia Sandoval (mother) - unless the court accepts mailed notice. Confidential Guardian Screening form is incomplete. Petitioner failed to include his Social Security number and Driver's License number.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Reviewed by: KT			
Reviewed on: 1/19/16			
Updates:			
Recommendation:			
File 30-Pimentel			